

ADMINISTRATION AND FINANCE COMMITTEE

DATE: December 9, 2008

CALLED TO ORDER: 5:30 p.m.

ADJOURNED: 6:09 p.m.

ATTENDANCE

ATTENDING MEMBERS

Marilyn Pfisterer, Chairwoman
Paul Bateman
Susie Day
Jackie Nytes
Joanne Sanders

ABSENT MEMBERS

Barbara Malone
Ryan Vaughn

AGENDA

PROPOSAL NO. 518, 2008 - reappoints Richard Petrecca to the County Property Tax Assessment Board of Appeals
"Do Pass as Amended" Vote: 4 -0

Update on the New Property Management System – Dan Pavey, ISA Project Manager

ADMINISTRATION AND FINANCE COMMITTEE

The Administration and Finance Committee of the City-County Council met on Tuesday, December 9, 2008. Chairwoman Marilyn Pfisterer called the meeting to order at 5:30 p.m. with the following members present: Susie Day, Jackie Nytes, and Joanne Sanders. Paul Bateman arrived shortly thereafter. Absent were Barbara Malone, and Ryan Vaughn.

PROPOSAL NO. 518, 2008 - reappoints Richard Petrecca to the County Property Tax Assessment Board of Appeals

Chairwoman Pfisterer said that she spoke with Mr. Petrecca and his wife is ill; Therefore, he will not be able to attend the meeting. She said that he has proven his commitment and expertise in the past and has served on the board for a very long time.

Councillor Day stated that she would like to see the proposal move forward pending Mr. Petrecca's attendance records.

Councillor Nytes asked if Mr. Petrecca can come to future meeting to give an update on the status of the County Property Tax Assessment Board of Appeals.

Councillor Sanders moved, seconded by Councillor Nytes, to send Proposal No. 518, 2008 to the full Council with a "Do Pass" recommendation. The motion carried by a vote of 4-0.

Update on the New Property Management System – Dan Pavey, ISA Project Manager

[Clerk's note: Councillor Bateman arrived at 5:45 p.m.]

Mr. Pavey explained the presentation, which is attached as Exhibit A. Some key points were:

- Marion County's core property tax system was implemented in the mid-1970's.
- The Property Project objectives include replacing the main frame system and improving property tax management processes.
- The Property Project motto is flexibility.
- Some accomplishments are: the PVDNet Personal Property Detail Functionality system has been implemented, reassessment was completed, rebate checks were sent out and the tax sale was successfully completed.
- Next steps include the implementation of the remaining PVDnet 3.1 Auditor and Treasurer functionality and the certification of PVDNet.
- The Property Tax System replacement project is on budget.
- There are approximately 400,000 parcels, if residential, commercial, and industrial are combined. If each parcel averages 30 elements (roof, house

exterior, decks, room types, plumbing, and heating for residential, and mezzanines, floor coverings, heating and cooling, etc. for commercial and industrial), – there would be 12 million elements to convert.

- The legacy application allowed too much leniency on how data could be entered into the system. PVDNet requires much more uniformity of the data entered, which is actually a state requirement for the system.
- The PVDNet conversion is the second largest project in the history of Information Services Agency (ISA).

Chairwoman Pfisterer asked what a script is. Mr. Pavey said that a script is a program that places the data that was extracted into the new PVDNet system.

Councillor Nytes asked if anyone in the city or county offices have been able to access any information on the PVDNet system. Mr. Pavey said that are several local government agencies that have access to the system, and they just received that access within the last month.

Chairwoman Pfisterer asked if the PVDNet system will help with determining who the owners are of abandon houses. Mr. Pavey answered in the affirmative.

Councillor Nytes asked if the Councillors will be eligible to be trained on the PVDNet system. Mr. Pavey answered in the affirmative.

Councillor Sanders asked if the vote eliminating the township assessors had any affect on the PVDNet system. Mr. Pavey answered in the negative.

Chairwoman Pfisterer asked if the budget for this project has decreased due to the township assessors being voted out. Mr. Pavey said that the budget would not be for this project. Chairwoman Pfisterer said that since the inventory law has been abolished, there should be no need for ISA to conduct an inventory. Mr. Pavey said that the inventory is still apart of personal property.

Councillor Sanders asked if there is a remote facility for storage of the PVDNet data in case there is a problem with the City-County Building (CCB). Kevin Ortell, Interim Chief Executive Officer (CEO) of ISA, said that with the Accella system, if something should happen to the CCB, there is a hot link to a site in California where everything would be transferred immediately. He said with the PVDNet system everything is backed up and taken off-site, but not in the same manner as the Accella system.

Chairwoman Pfisterer asked if there is a backup plan if a disaster should happen in the CCB and at the off-site location. Mr. Ortell said with the Accella system the chances of a natural disaster affecting both sites at the same time are very slim. If a natural disaster was to happen locally where it affects the PVDNet system, ISA would use a facility called SunGard, and the other facility options are in Chicago and New Jersey. Chairwoman Pfisterer asked if the PVDNet system is currently backed up at these off-

Administration and Finance Committee
December 9, 2008
Page 3

site locations. Mr. Ortell stated that in most cases after the disaster the information would be re-routed to the off-site locations.

There being no further business, and upon motion duly made, the meeting was adjourned at 6:09 p.m.

Respectfully Submitted,

Marilyn Pfisterer, Chairwoman

MP/rjp

Legacy to PVDNet – Data Conversion Summary

- Approximately 400,000 parcels when you include both Residential and Commercial and Industrial
- Converting from 30 files in the mainframe legacy application into over a thousand tables in PVDNet – Current technology and platform
- 400,000 parcels and if each one averages 30 elements (roofs, house exteriors, decks, room types, plumbing, heating for residential – mezzanines, floor coverings, heating and cooling etc for commercial and industrial) – that would be 12 million elements to convert
- Simple, just write a script to convert each type of element – all decks, roof types
- **But**, the Legacy application allowed too much leniency on how data could be entered into the system
- PVDNet requires much more uniformity of the data (actually it is a state requirement)
- What PVD found was that over the 30+ years the legacy system has been operational, each township might have handled each element differently, in fact even within a township there might not have been a standard way to enter data (different elected officials over the 30 plus years in the townships) – beginning to see the picture
- PVD would run the extracted legacy data through a script, but the dollar values did not match, so the PVD subject matter experts had to figure out how a given element was entered, the extracted data separated and some had to be run through one script and the rest through others – PVD wound up creating thousands of scripts
- They then got to the point where scripts could not be used in some cases because there were so many differences. In many cases, the PVD Subject Matter Experts actually researched items in legacy and manually fixed 10s of thousands of them in PVDNet
- Finally, it boiled down to where the PVD SME's could not figure out how the remaining items should be converted, that amounted to about 60,000 elements. PVD, then created spreadsheets by township of the remaining items – they fell into 9 or 10 categories and some parcels showed up in more than one category
- The townships then had to analyze, prioritize and fix those data cleansing items as required
- Because of reassessment and the ensuing need for our resources to support that effort, PVD stepped forward and put more resources and effort into the conversion than the contract called for. We are very grateful that they went above and beyond (at no additional cost to the city/county) to ensure the data conversion could be completed and be as clean as possible..

Property Tax System Replacement Project Status Report





Agenda

- ➡ Brief Property Project Background
- ➡ Property Project Motto
- ➡ Accomplishments
- ➡ Next Steps
- ➡ Overall Project Status
- ➡ Questions



Brief Property Project Background

➔ Current Legacy System

- ✓ Marion County's core property tax system was implemented in the mid 1970's

➔ Project Objectives

- ✓ Replace mainframe system
- ✓ Improve property tax management processes
- ✓ Meet State requirements and legislative changes



Property Project Motto - Flexibility

➔ Integrated Timeline of all Property Tax-related Projects

- ✓ Reassessment - completed
- ✓ 06pay07 Reconciliation Tax Bills - completed
- ✓ 06pay07 Settlement - completed
- ✓ Rebate Checks - completed
- ✓ PVDNet 3.1 Implementation (new property tax system) – 75%
- ✓ Tax Sale - completed
- ✓ 07pay08 Provisional Tax Bills - completed
- ✓ 07pay08 Provisional Settlement
- ✓ 07pay08 Reconciliation Tax Bills
- ✓ 07pay08 Reconciliation Settlement



Accomplishments

- ➔ Implemented PVDNet Personal Property Detail Functionality
- ➔ Reassessment was completed
- ➔ 06pay07 Reconciliation Tax Bills were sent out
- ➔ Rebate Checks were sent out
- ➔ Tax Sale was successfully completed
- ➔ 07pay08 Provisional Tax Bills have been printed and mailed out



Accomplishments

- ➔ The CAMA and Property data has been converted from legacy into PVDNet 😊
- ➔ The PVDNet 3.1 Assessor module has been implemented into production 😊



Next Steps

- ⇒ Implementation of the remaining PVDNet 3.1 Auditor and Treasurer functionality
- ⇒ Certification of PVDNet
- ⇒ 07pay08 Reconciliation Tax Bills
- ⇒ Implementation of PVDNet version 3.2.

Project Status



- ➡ The Property Tax System Replacement Project is on budget!



Questions?